



Smartsheet History Files

Okay, so I'm on the history file here. You can see this one is blank. So, this is a brand-new history file and wherever we've got an OKR smart sheet, we also have a history file as well. This history file might get depending on the volume, there are too many rows. Smartsheet has a limit.

There could be multiple history files when this one gets full, we'll cascade it to another one-off load it to another one. But as you start your Smartsheet journey with OKRs you just start with one history file. So, at the moment, this one is blank and what will happen each week at a specific time will vary depending on the project.

But let's just take these top 20 rows over here, just to show you what will happen on a weekly basis, these are going to get moved, not copied, I'm just going to copy so I do not lose these here they are going to move. They're going to move to that history file so what will happen every week at the same time and if you look at my calendar now it's 25th of February, 1600, 1,602. So, let's say this was a time when all these rows get snapshotted, I'm going to say okay. Go for copying. And if I come back to the history file over here within a few seconds there they drop in the column order isn't necessarily the same, but the columns will be identical.

Whatever we've got in this sheet, at least all of those columns will make it into the history file so each week a new set of history will come through into the sheet. One of the most important fields as part of this move is the date stage created. The data the stage is created. It's the 25th of February. Same as what's on my calendar. What happens as the rows come in to the sheet is a trigger that puts today's date on it. So that will be weekly. Now when you start reporting in your dashboards and you want to show progress on tasks on statuses, on number of next activities.

This will become the date that is critical for that trending. So, it will become a date field in your dashboard. And that's all, that's really important here. When we get to the automation, we're going to talk about which automation is pushing the date so that you're aware of that, but that is going to be in a different lesson

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Or you go refer back to that lesson. We'll explain exactly what all these automations are, but for now, as far as the history file is concerned, if you creating dashboards, make sure you connect to the main sheet as well as to the history sheet or history sheets. If these get full.